

Apptivia Permissions Structure

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Overview

This document summarizes role-based access across the Apptivia Platform. Permissions are applied per role with optional per-user overrides managed by admins.

Admin

- Full access to all pages, filters, and system settings.
- Can configure scorecards, KPI libraries, integrations, and permissions.
- Can create/edit contests, teams, and team members.
- Defaults to all data on login.
- Access to organization-wide notifications.

Manager

- Access to all pages with data scoped to assigned team.
- Can use filters within the assigned team and view Team Snapshot.
- Can create/edit contests and manage team members.
- Coach workflow for reps flagged as needing coaching.
- Receives team notifications only.

Coach

- Lite Manager permissions for team coaching and progress tracking.
- Access to team-scoped analytics, coach insights, and contests.
- Receives team notifications only.

Power User

- Personalized dashboards with default filters set to the logged-in user.
- Can view own scorecard/coach insights and join/withdraw contests.
- No scorecard configuration access.
- Notifications limited to personal performance updates.

Core Permissions

- View Dashboard
- View Coach
- View Contests
- View Analytics
- View Systems
- View Profile
- Export Data

Administrative Permissions

- Configure Scorecard
- Manage KPI Library
- Manage Integrations
- Manage Teams
- Manage Team Members
- Manage Permissions

Coaching & Team Permissions

- View Team Snapshot
- Coach Team Members
- View Team Data
- View All Data (admin only)

Contest Permissions

- Create Contests
- Edit Contests
- Join Contests
- Withdraw From Contests

Notification Scopes

- Self notifications: Power Users and above
- Team notifications: Managers and Coaches
- Organization notifications: Admins

Generated by Apptivia Platform